Procurement Items Overview

Procurement items and categories in Cardinal are synonymous with the National Institute of Governmental Purchasing (NIGP) standards. Users with the Contract Administrator or Buyer role can manage procurement items necessary to build and manage contracts and/or establish item/supplier relationships.

Item setup is integral to the Cardinal Procurement module because it provides a means to track commodity prices, quantities used, market trends, and quality of goods/services received from suppliers by item, helping you make better purchasing decisions. Only authorized Fiscal Division Inventory Programs Section (IPS) and Administrative Services Division (ASD) employees can establish new items and define item attributes. The Contract Administrator and Buyer have access to create an item/supplier relationship for an item.

Item attributes include an Item Category and Item ID number, the purchasing description, Unit of Measure (UOM), related suppliers, pricing information, and WebIMS inventory ID (if applicable).

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Understanding Items

The item code structure we use in purchasing is the National Institute of Governmental Purchasing (NIGP) standard. NIGP establishes categories that group the item codes into commodities, which are represented by a 3-digit class code, 5-digit class-item code, and a 7-digit class-item-group code. 10-digit values are very specific and have a fixed Unit of Measure (UOM).

Cardinal purchasing shares its information about items with other Cardinal financial modules, as well as eVA. Suppliers must be registered in eVA, which interfaces into Cardinal, in order to receive contract awards or purchase orders.

Although each item established in Cardinal is directly associated with one category, a hierarchy of categories is established. This hierarchy is used by the Cardinal item search function so you may logically navigate to an item.

There are two categories of NIGP numbers or Class Code (represented by the 1st three digits):

- 001 – 899 represent goods

- 900 – 999 represent services

The following is an example of the 10-digit NIGP code structure breakout for **Item ID 7507731047**.

Item ID	Category	Description
750	Class Code	Road Materials Not Asphaltic
750**77**	Item	Sand and Gravel
7507**731**	Group	Gravel
7507731**047**	Detail*	No. 9 UOM=Ton

*The last two digits of the **Item ID**, also referred to as Detail in the NIGP code structure, are assigned by the Fiscal Inventory Manager when the new item is set up in Cardinal.

Add Items

Once you confirm that the desired NIGP item does not exist in Cardinal, contact the ASD or Fiscal Division to have it added. If an item is specific to inventory (i.e., WebIMS) the item must be assigned an IMS Stock Number before it can be added to Cardinal. Once WebIMS is updated, the new NIGP number/**Item ID** can be assigned.

General Item Information

- Items and categories in Cardinal match NIGP and eVA item numbering.

- **Item**: 10 digits with the **Description** and **UOM** field predetermined and cannot be changed.

- **Category**: 3, 5, or 7 digits and the **Description** and **UOM** may be edited.

- Inventory items must be 10 digits and have an associated WebIMS number.

- Item/supplier relationships are required when building contracts.

- Item/supplier relationships are not required when building requisitions, purchase orders (PO), and sourcing events.

Line Items ?					Personalize | Find | View All | 🔲 | 🗊	First ◁ 1-6 of 6 ▷ Last		
Basic Definition	Advanced Definition							
	Line	Item ID	Description		Category	UOM	Qty	Start Price	Ext. Amount	Weighting
☐	1	7503548480	STONE, CRUSHED GRADE 25	🗐	7503548	LTN	15000.0000	12.4900	$187,350.00	0.00000
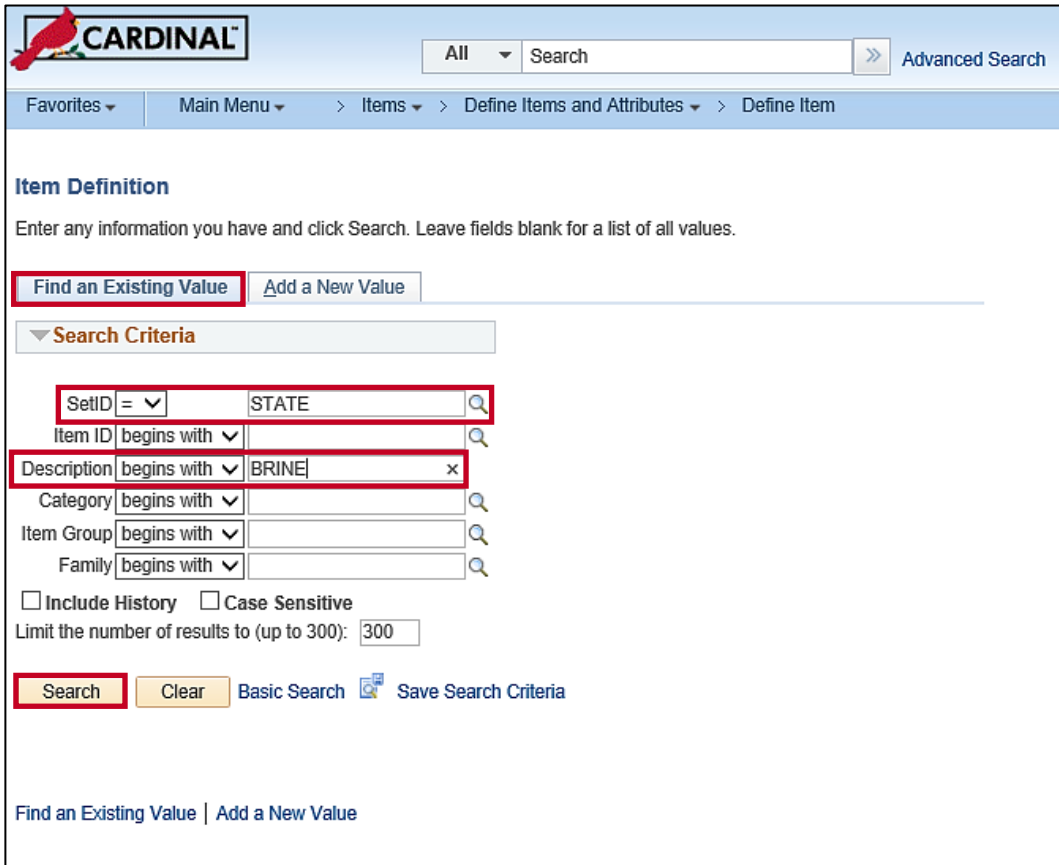
Example: Item shown displays pre-populated **Description**, **Category**, and **UOM**

Search for an Item

1. A request is made to add an NIGP item. You must first confirm that the item does not exist in Cardinal. If it does exist, verify its **Purchasing Attributes**. To search for the item, navigate to the **Item Definition** page using the following path:

   Main Menu > Items > Define Items and Attributes > Define Item

2. The **Item Definition** page displays.

3. Click the **Find an Existing Value** tab.

4. Ensure that **STATE** is listed in the **SetID** field.

5. In the **Description** field, enter the search term using the various search criteria available.

6. Click the **Search** button to initiate the search.

7. A listing appears that displays all items that match the search term(s). If the item you are searching for is listed then it is indeed an NIGP item and you do not need to add it.

8. Select an item to view its attributes.

9. The **General** tab displays by default.

10. The **Standard UOM** (Unit of Measure) values in Cardinal match those in WebIMS. The value assigned here interfaces to eVA.

11. Check the **Inventory Item** check-box for all WebIMS items.

12. Click the **Custom** tab.

13. If the **WebIMS Item ID** field is blank, the item is not a WebIMS inventory item. If the item is a WebIMS-related item, a value is listed.

14. Click the **General** tab.

15. Click the **Purchasing Item Attributes** link.

16. The **Purchasing Attributes** tab for the **Item** displays in a pop-up window.

17. The item is available if the **PO Available Date** field has a date value less than today. If the item is available, respond back to the requester and provide them with the **Item ID** (i.e., 10-digit NIGP number), a description of the item, and let them know if the item is a WebIMS inventory item. If the requester does not feel the existing item is specific for their use, you may need to add a new item.

18. If the requested item does not exist in Cardinal, users with the Fiscal Inventory Manager role can set up a new item.
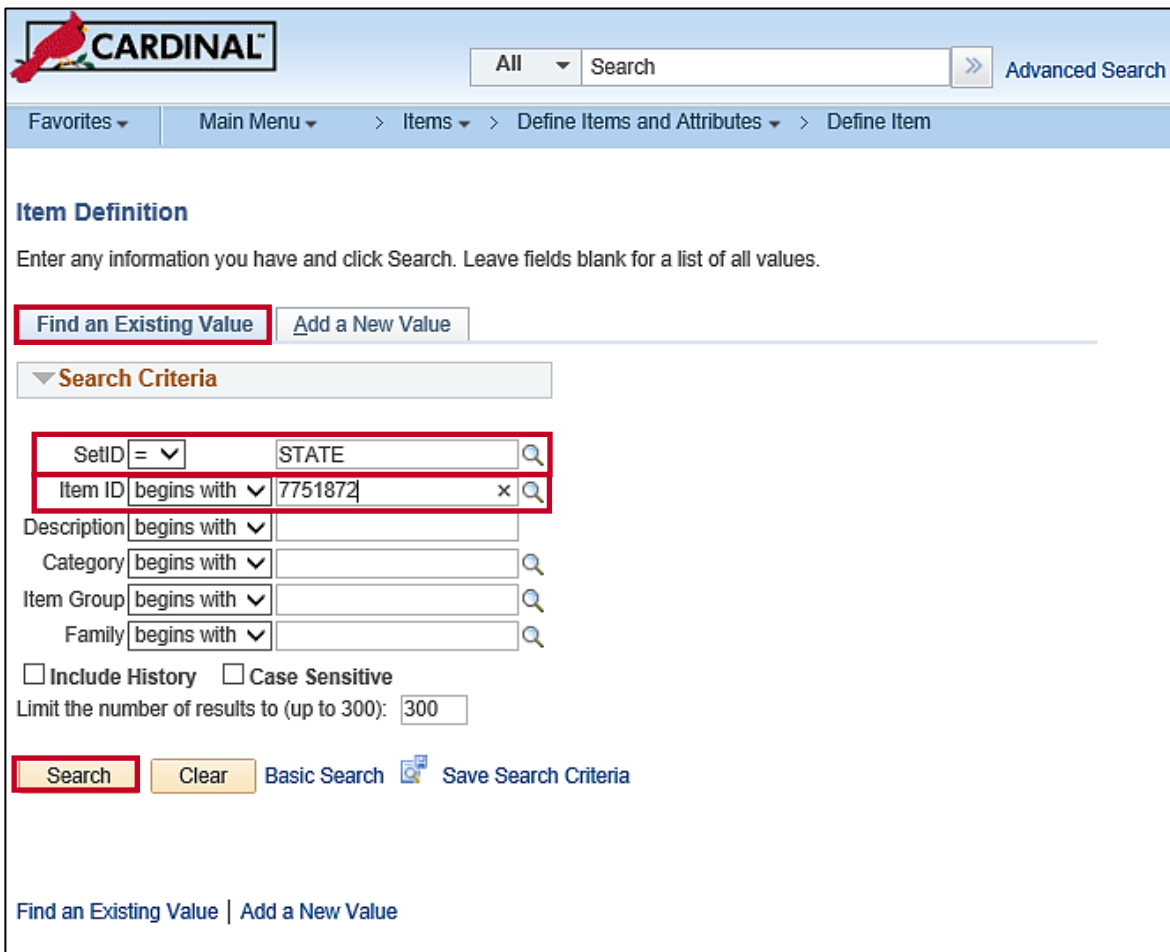
Adding a New NIGP Number (Item ID)

Users must have the Fiscal Inventory Manager role in order to set up new items in Cardinal.

1. First you will need to determine the new item number using the NIGP Code Structure. (Refer to the **Add Items** section at the beginning of this job aid for the NIGP Code Structure).

2. Navigate to the **Item Definition** page using the following path:

Main Menu > Items > Define Items and Attributes > Define Item

3. The **Item Definition** page displays.

4. Click the **Find an Existing Value** tab.

5. Ensure that **STATE** is listed in the **SetID** field.

6. In the **Item ID** field, enter the first five or seven digits of the general category from the previous search. This allows you to easily search for all items with this general category based on the NIGP Code Structure. (Refer to the **Add Items** section at the beginning of this job aid for the NIGP Code Structure).

Item ID	Category	Description
1st 3rd Digits	Class	Road Materials Not Asphaltic
4th and 5th Digits	Item	Sand and Gravel
6th and 7th Digits	Group	Gravel

7. Click the **Search** button.

| Favorites ▾ | Main Menu ▾ | > Items ▾ | > Define Items and Attributes ▾ | > Define Item |

Item Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.

| Find an Existing Value | Add a New Value |

▼ **Search Criteria**

SetID [= ▾] [STATE ×] 🔍
Item ID [begins with ▾] [7751872] 🔍
Description [begins with ▾] [ ]
Category [begins with ▾] [ ] 🔍
Item Group [begins with ▾] [ ] 🔍
Family [begins with ▾] [ ] 🔍

☐ Include History   ☐ Case Sensitive
Limit the number of results to (up to 300): [300]

| Search | Clear | Basic Search 🔲 Save Search Criteria

Search Results

View All   First ◀ 1-2 of 2 ▶ Last

SetID	Item ID	Description	Category	Item Group	Family
STATE	7751872000	BRINE, SALTWATER	7751872	(blank)	(blank)
STATE	7751872150	420 LB./DRUM (CONTAINS 111 LBS	7751872	(blank)	(blank)

Find an Existing Value | Add a New Value

8. A complete listing displays of all items within the **Class**/**Item**/**Group** you selected. You need to determine if there is numbering space available within this general NIGP category. If yes, you can use this general category and add the Detail number (last 3 digits of the NIGP) to it. Then you will have your complete 10-digit NIGP number for this new item.
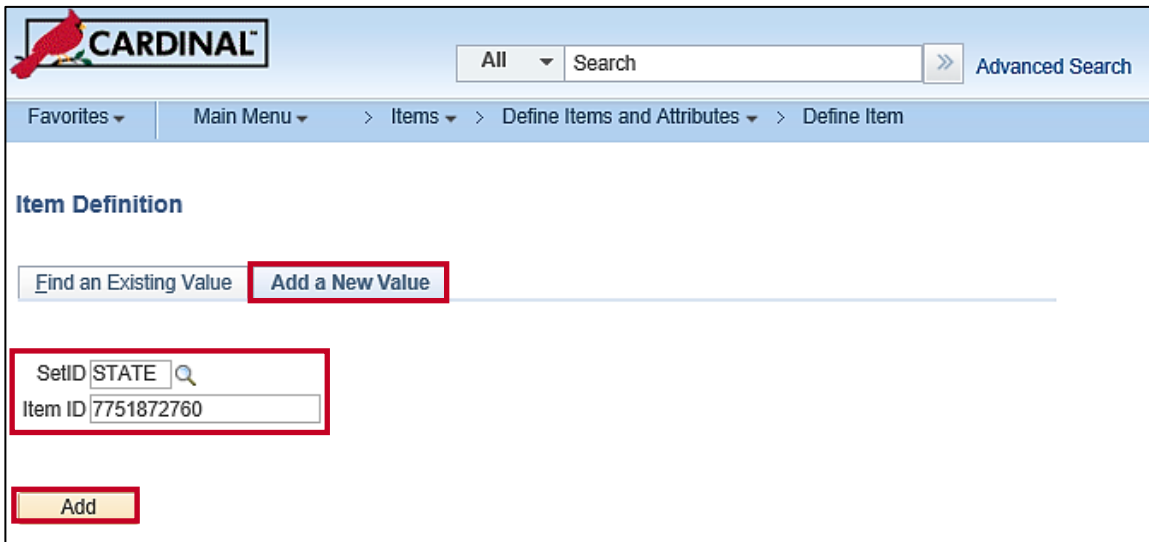
Item ID	Category	Description
1st 3rd Digits	Class	Road Materials Not Asphaltic
4th and 5th Digits	Item	Sand and Gravel
6th and 7th Digits	Group	Gravel
7th, 8th and 9th Digits	Detail*	No. 9 UOM=Ton

*The last two digits of the NIGP number, also referred to as Detail in the NIGP code structure, are assigned by the Cardinal Fiscal Inventory Manager when the new item is set up in Cardinal. In this example there are only 2 **Item ID**s that begin with 7751872. For the Detail number you assign to the end of the NIGP number you may use any number between the two numbers. In this example, the last 3 digits of the new **Item ID** would be any number from 001 to 149 or from 151 to 999. The newly created NIGP number will be your **Item ID** number in Cardinal.

Add a New Item
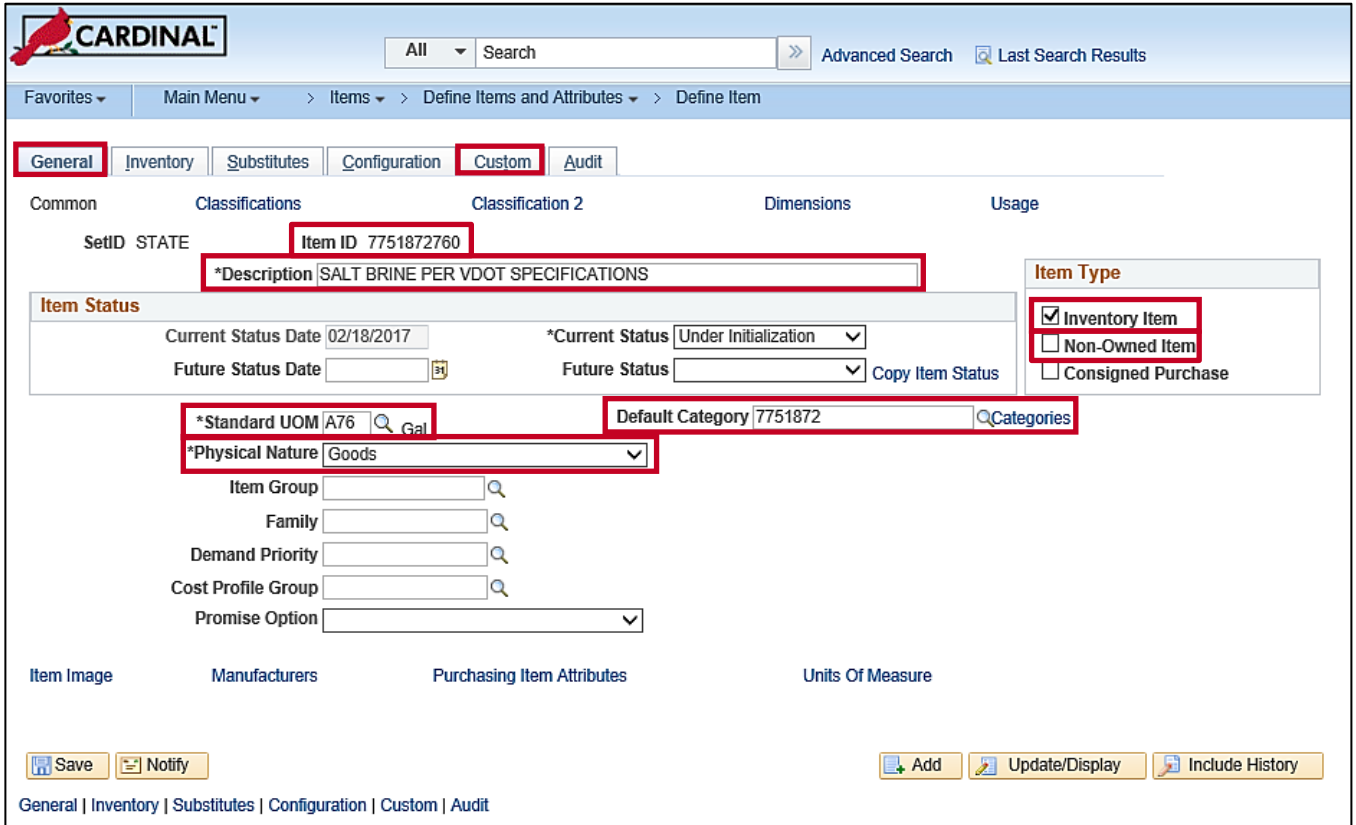
9. Once you have determined the new NIGP number /**Item ID**, you will need to add it to Cardinal. Navigate to the **Item Definition** page using the following path:

    Main Menu > Items > Define Items and Attributes > Define Item

10. Click the **Add a New Value** tab.

11. Ensure that **STATE** is listed in the **SetID** field.

12. Enter the new NIGP/**Item ID** number in the **Item ID** field. If the word **NEXT** is the defaulted value, simply delete it and enter the new **Item ID**.

13. Click the **Add** button.

14. Verify that you entered the correct 10-digit NIGP number. This is done by checking the **Item ID** number.

15. Enter/select values for the following required fields:

    – **Description**

    – **Standard UOM**

    – **Default Category** (1st seven digits of the NIGP number)

    – **Physical Nature** (**Goods** or **Services**)

16. If the item is a WebIMS inventory item, select the **Inventory Item** check-box. If it is not an inventory item, select the **Non-Owned Item** check-box.

17. Click the **Custom** tab.

18. If the item is an inventory item, enter the **WebIMS Item ID** (i.e., stock number). If it is not an inventory item, leave the field blank.

19. Click the **Save** button.

20. Click the **General** tab.

21. Click the **Purchasing Item Attributes** link.

22. The **Purchase Items Attributes** page displays.

23. The **PO Available Date** will default to today's date. Do not change this value.

24. In the **Unavailable** date field enter **12/31/2999**.
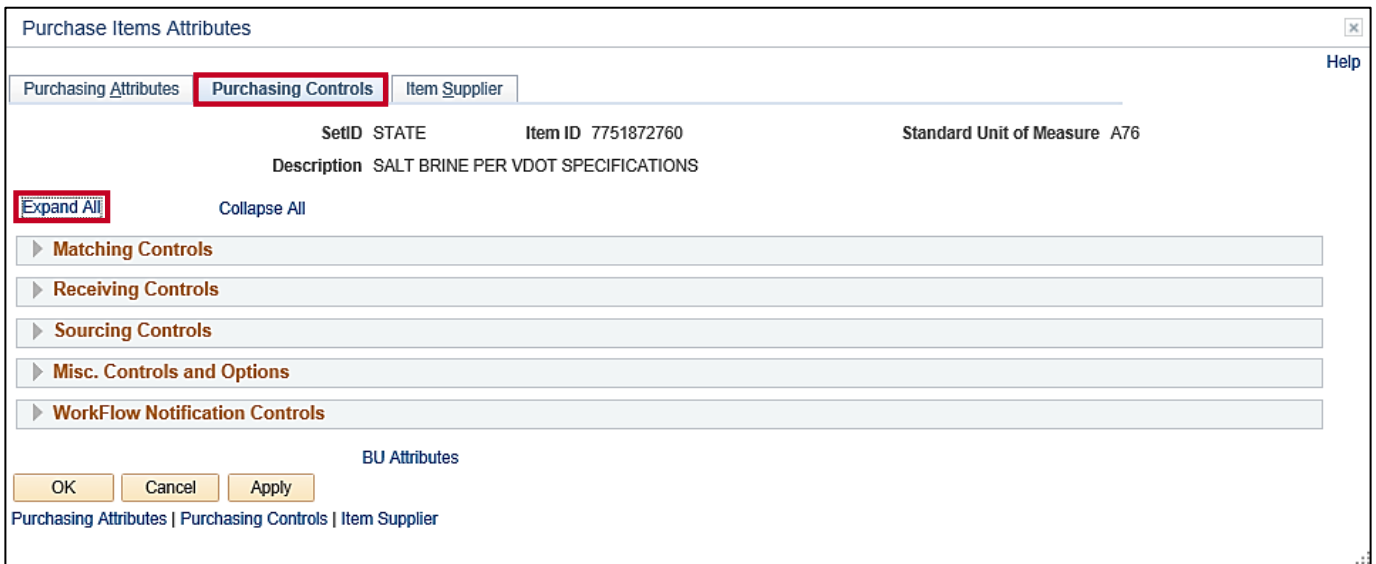
25. In the **Standard Price** field enter **.01** (one cent).

26. If the **Description** you entered on the previous page was shortened, you may enter the full description into the **Long Description** field.

27. In the **Chartfields** section, a default **Account** value may populate. If an **Account** value does not default, you need to enter one.

28. Click the **Purchasing Controls** tab.

29. All sections are collapsed for this panel group.

30. Click the **Expand All** link to see all available fields.

31. Some fields will have default values and are grayed out.

32. Enter valid values in required fields, as applicable:

–   **Unit Price Tolerance**: defaults to **0.00**.

–   **Ext Price Tolerance**: defaults to **0.00**.

–   **Receiving Required**: drop-down menu should always be set to **Required**.

–   **Qty Rcvd Tolerance %**: set to **10** for bulk commodities. All others are set to **0**.

33. Click the **Apply** button.

34. Click the **OK** button.

35. The **General** tab displays.

36. Click the **Save** button.

37. If the item can be received and accepted in fractions, click the **Units of Measure** link.

Modify the Unit of Measure
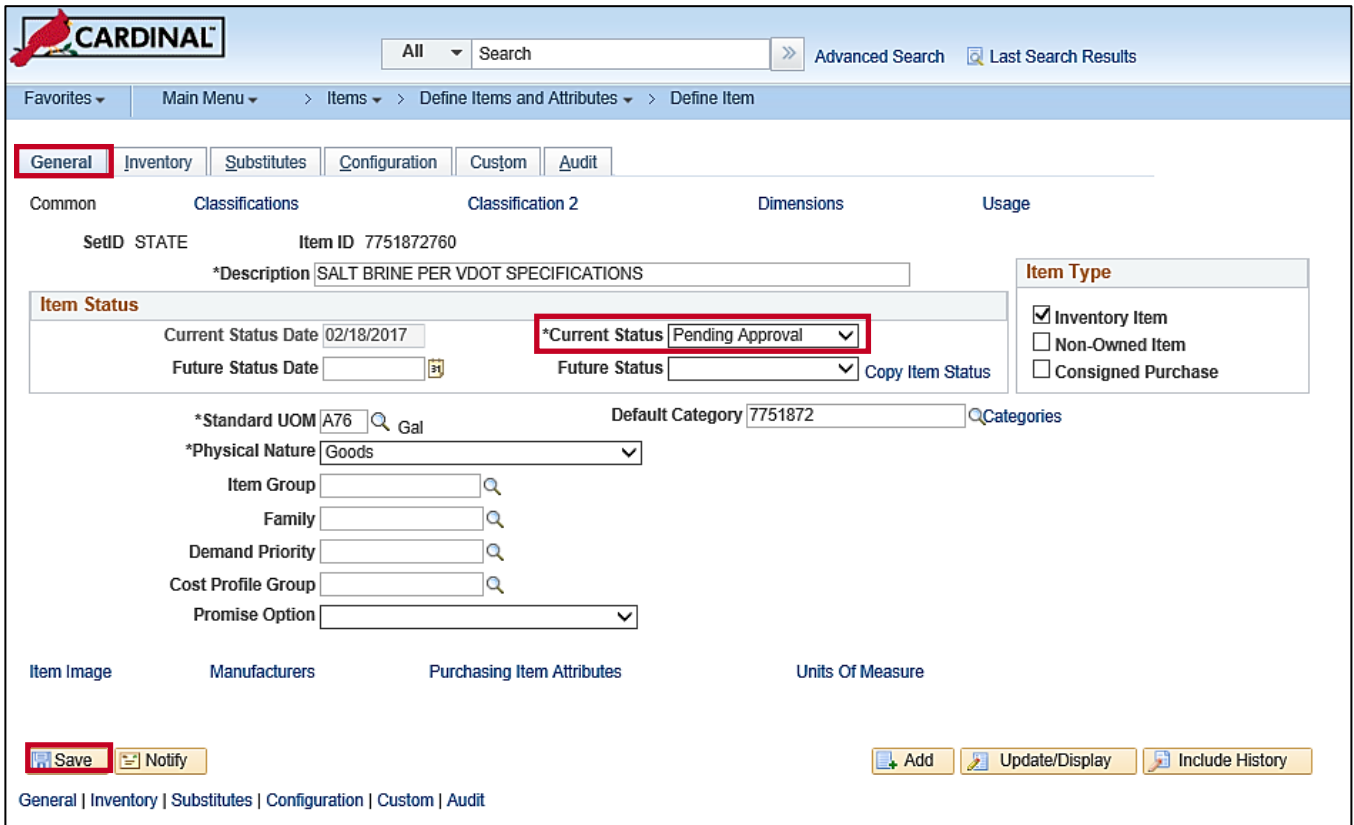
38. Using the **Quantity Precision** drop-down menu, select **Decimal**.

39. The **Rounding Rule** section should always be set to **Natural Round**.

40. Click the **Apply** button.

41. Click the **OK** button.

42. The **General** tab displays.

43. Click the **Save** button.

44. Using the **Current Status** drop-down menu, select **Pending Approval**.

45. Click the **Save** button.

46. Upon **Save** the **Current Status** updates from **Pending Approval** to **Active**. Your new item is created and the process is complete.

47. Once a new NIGP number/**Item ID** is created in Cardinal, the item/supplier relationship needs to be established in Cardinal.

Create a New Item/Supplier Relationship

1. To create the item/supplier relationship in Cardinal, navigate to the **Purchasing Attributes** search page using the following path:

    Main Menu > Items > Define Items and Attributes > Purchasing Attributes

2. Enter the **SetID**. In this example, **STATE** is used.

3. Enter the **Item ID**. In this example, the item **9105435001** (painting services) is used.

4. Click the **Search** button.

5.   The **Purchasing Attributes** page displays.

6.   Click the **Item Supplier** tab.

7.   Suppliers with associations to the item selected display.

8.   You may view or find a particular supplier using the **Show previous row** or **Show next row** arrow icons or by clicking on the **Find** or **View All** links. In this example, our supplier is not in the list and needs to be added.

9. To add a new supplier relationship to this item, click the (**+**) sign in the **Item Supplier** section of the page.

10. The supplier **Priority** number is incrementally assigned. In this example, it is **9**.

11. Click the **Supplier ID** lookup magnifying glass.

12. Find and click the **Supplier ID** that you wish to associate with the selected item.

13. The selected supplier information populates as shown below.

14. Click the **Item Supplier UOM** link.

15. The **Supplier's UOM and Pricing Information** page displays.

16. Item information populates as shown and is available for edit, if necessary.

17. The **Minimum Quantity** may be less than 1.

18. The **Maximum Quantity** will default to **0** and should not be changed.

Supplier's UOM and Pricing Information

Help
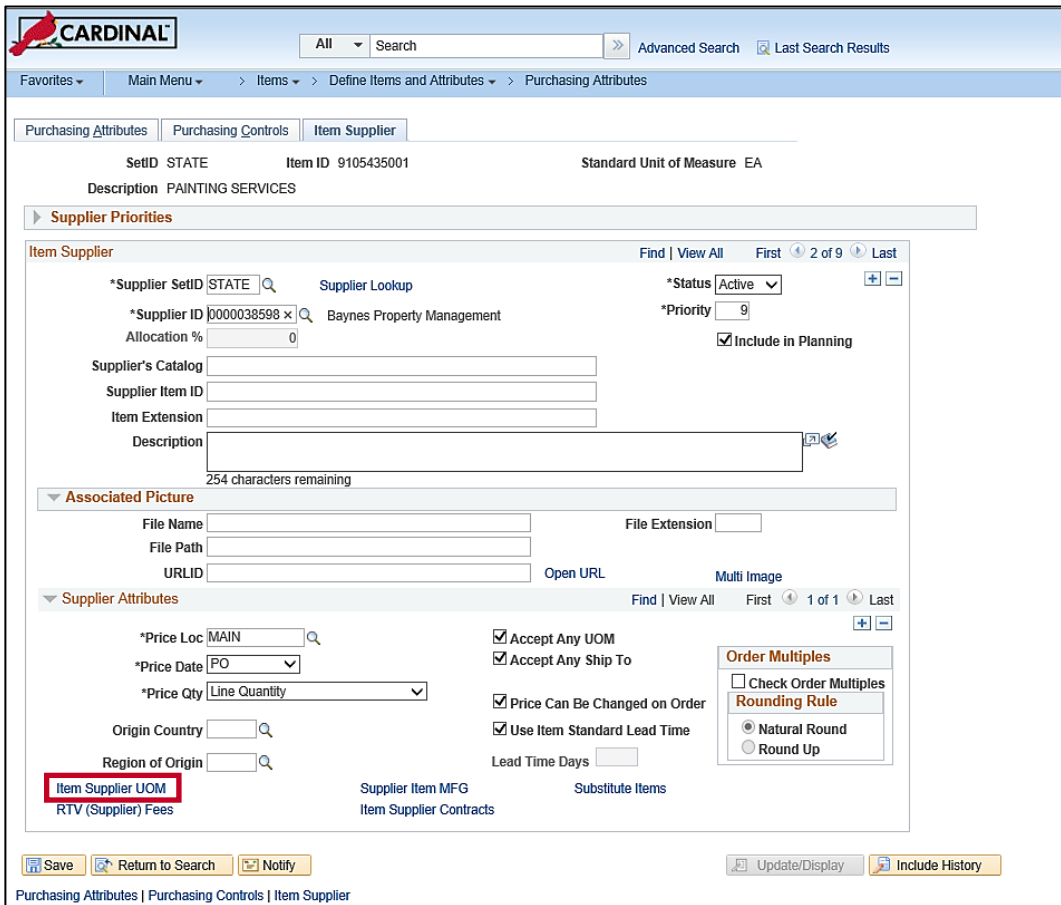
SetID STATE   Item ID 9105435001   PAINTING SERVICES
Supplier 0000038598   Baynes Property Management   Location MAIN

Unit Of Measure   Find | View All   First ◀ 1 of 1 ▶ Last

*UOM EA 🔍 Each   ☑ Default   Packing Details   ➕ ➖
Minimum Quantity   1.0000   Effective Dated UOM
Maximum Quantity   0.0000   Order Quantity Multiple   Update PO

Conversion to Item Base UOM

*Rate Type Standard ▾   *Qty Precision Decimal ▾   **Rounding Rule**
                                                                ⦿ Natural Round
Std UOM Rate   Get Std Rate   ◯ Round Up

UOM Price Attributes   Find | View All   First ◀ 1 of 1 ▶ Last

*Effective Date 02/18/2017 📅   *Currency Code USD 🔍   ➕ ➖
*Status Active ▾   Supplier Price   3500.00000
*Minimum Quantity   1.0000   Standard Price Update Status No Update ▾
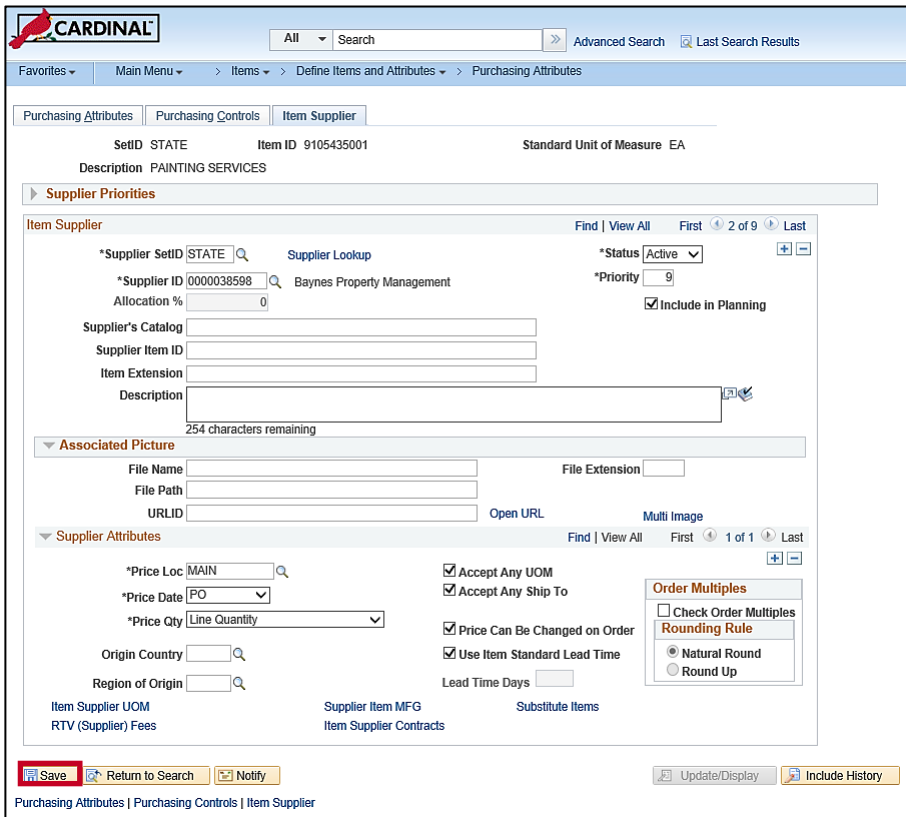Qty Rcvd Tolerance %   0.00   BU Price Update Status No Update ▾
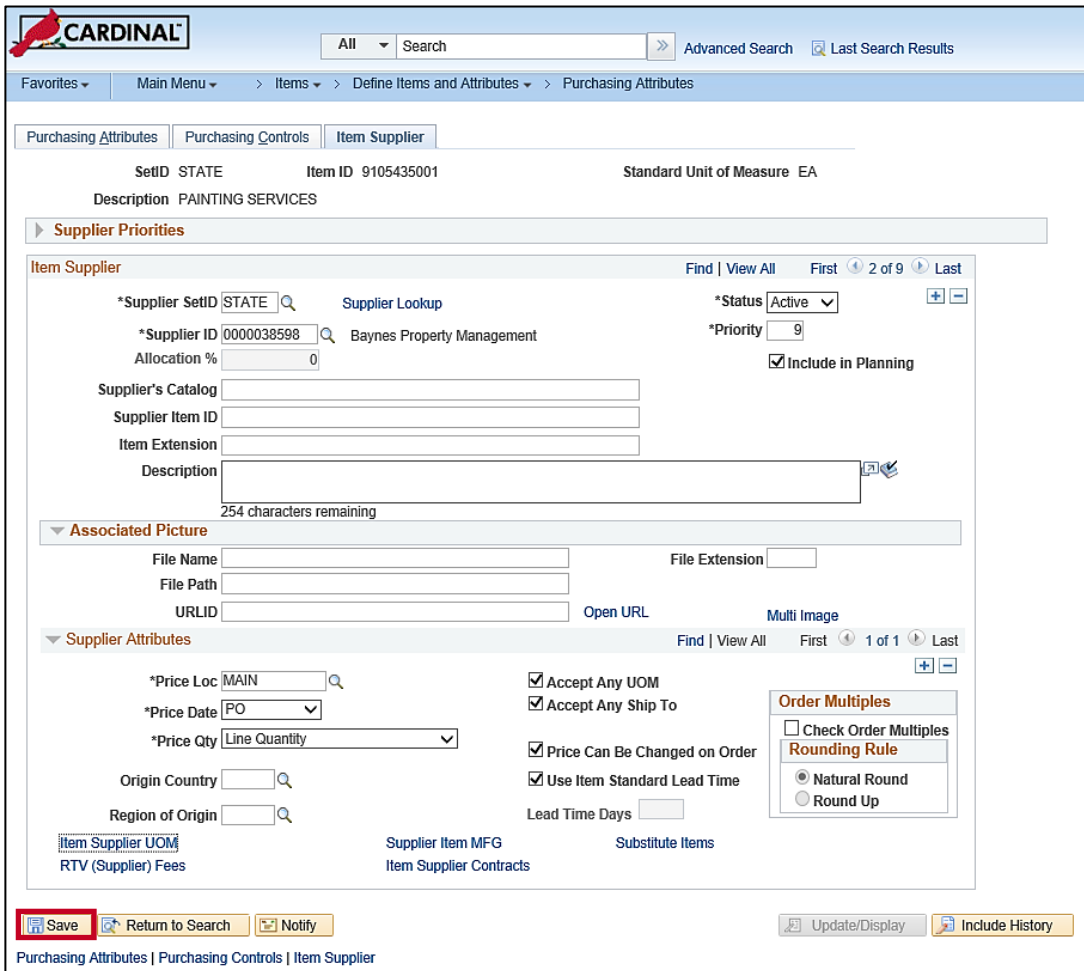
▸ Matching Controls

OK   Cancel

19. The **Qty Precision** value defaults to **Whole Number** and should be changed to **Decimal**.

20. Click the **OK** button.

21. The **Purchasing Attributes** page displays.

22. Click the **Save** button. The item supplier relationship is now set.

Create Item/Supplier Relationship: Strategic Sourcing Event

Upon selection and posting of the award to the bidder, the supplier/item relationship is automatically established. The item is now available to be added to any contract specific to this supplier.

Please refer to the course entitled **PR345: Strategic Sourcing**, located on the Cardinal website in **Course Materials** under **Training**, for additional details on creating and awarding events.

Create Item/Supplier Relationship: Purchase Order

Item/supplier relationships are not required when creating ad-hoc purchase orders. Cardinal allows the user to select any item or category for insertion into a line. POs may also be created from sourcing events or contracts.

Please refer to the course entitled **PR344: Processing Purchase Orders**, located on the Cardinal website in **Course Materials** under **Training**, for details on creating POs.

1. When entering a PO from a sourcing event where the quantity on the PO is greater than the quantity on the sourcing event, a message similar to the one below may display:
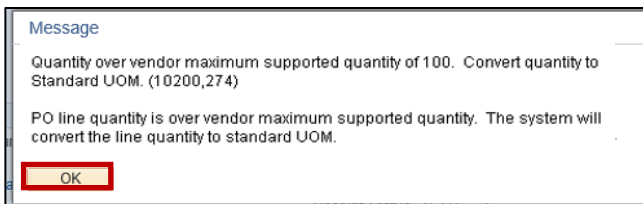
2. Click the **OK** button.

3. As the **Maximum Quantity** and **Supplier Price** default in from the sourcing event or contract, you may need to update the **Purchasing Attributes** on the **Item/Supplier Relationship** page in order to proceed.

4. Using the **Item ID** from the event or contract award, find the item and follow the steps in the section above entitled **Created a New Item/Supplier Relationship**.

5. Find the supplier on the **Purchasing Attributes** page

6. Using the **Item Supplier UOM** link, update the **Maximum Quantity, Supplier Price,** and **Qty Precision** values, as needed.

7. Click the **OK** button.

8.   The **Purchasing Attributes** page displays.

9.   Click the **Save** button.

10.   Upon **Save**, the item/supplier relationship is updated with your changes.

Create Item/Supplier Relationship: Procurement Contract

When entering a contract using the **Item** lookup, the items listed are narrowed down to items related to the supplier selected. If the item you are searching for is not available in the list, you will need to create the relationship by following the steps noted in the section entitled **Create a New Item/Supplier Relationship**.
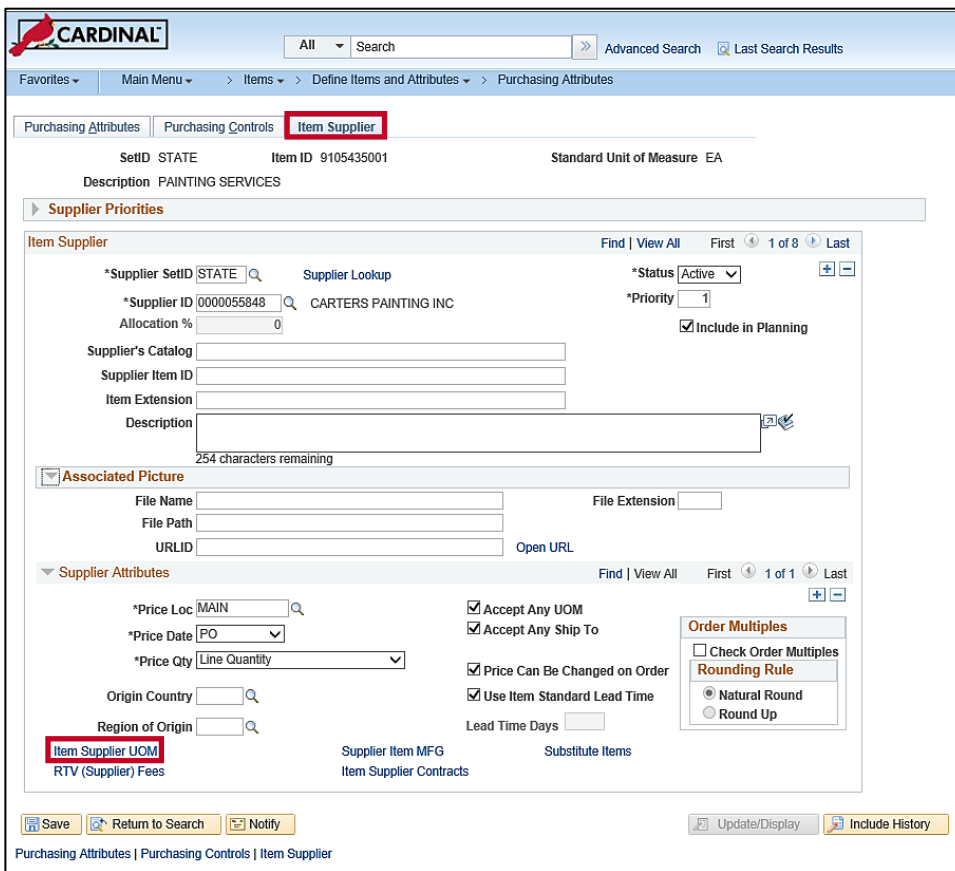
Please refer to the course entitled **501 PR348 Procurement Contracts**, located on the Cardinal website in **Course Materials** under **Training**, for details on creating contracts.

Add an Item Unit of Measure (UOM)

Contact the VITA helpdesk to request a new **UOM** type. Be sure to reference Cardinal in the helpdesk request. Once your helpdesk request is complete, you may add the new **UOM** to an item/supplier relationship.

Example: Item 9105435001, Painting Services, has a **UOM** of **EA** (each). Item 9105435000, Painting Services, has a **UOM** of **HUR** (hour). You need to have a **UOM** of **FTK** (square foot), for a specific contract service. You can request that a new **UOM** be added via the helpdesk. Once the new **UOM** is added, you can set it up on the item/supplier relationship.

1. Using the **Item ID**, find the item and follow the steps noted in the section above tilted **Create a New Item/Supplier Relationship**.

2. On the **Items Supplier** tab, locate the supplier.

3. Click the **Item Supplier UOM** link.

4. The **Supplier's UOM and Pricing Information** page displays.

5. To add a new **UOM** to the relationship, click the (**+**) sign in the **Unit of Measure** section of the page.

6. Select the new **UOM** using the **Look Up UOM** magnifying glass.

7. Update the **Qty Precision** to **Decimal**.

8. Enter a **Supplier Price**. Any value may be entered and this information will default on the PO.

9. Click the **OK** button.

10. The **Purchasing Attributes** page displays.

11. On the **Purchasing Attributes** page click the **Save** button. The item is now set up with the additional UOM and is available for selection when using this supplier.

Example: Update the UOM on a Procurement Contract

Previously, we added the new **UOM** of **FTK** on the item (**9105435001**)/supplier (**000051418**) relationship.

1. To use this **UOM** on a procurement contract, navigate to **Contract Entry – Contract** using the following path:

    Main Menu > Procurement Contracts > Add/Update Contracts

Note: For additional details on creating contracts please refer to the course entitled **PR348: Procurement Contracts**, located on the Cardinal website in **Course Materials** under **Training**.

2. Create a contract using **Supplier ID 0000051418**.

3. Click the **Look up Contract Line Type ID** icon to select the **Item ID 9105435001**.

4. The items listed are narrowed down to items related to the supplier selected.

5. Click the **Item Id 9105435001** link.

6. The default **UOM** of **EA** is automatically populated.

7. Click the **Line Details** icon to the left of the **Item**.

8. The **Details for Line X** page displays.

9. Expand the **Pricing Information** section by clicking on the arrow to the left of the section title.

10. Click the **UOM** lookup icon.

11. Both **UOM**s are available.

12. Select the **Square Foot** link.

13. The **FTK** (i.e., square foot), **UOM** is populated.

14. Click the **OK** button and complete the contract entry procedures.
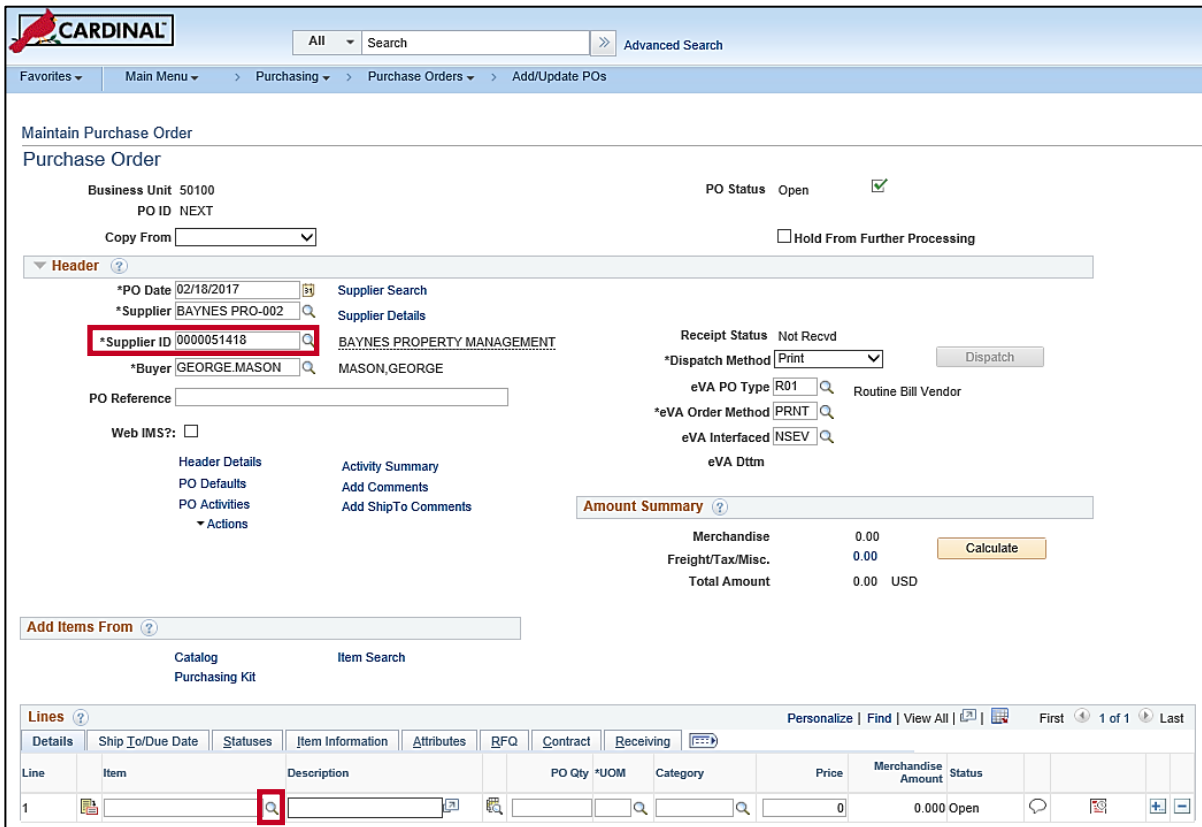
Example: Update the UOM on a Purchase Order

Previously we added the new **UOM** of **FTK** on the item (9105435001)/supplier (000051418) relationship.

1.   To use this **UOM** on a PO, navigate to the **Maintain Purchase Order – Purchase Order** page using the following path:

Main Menu > Purchasing > Purchase orders > Add/Update POs

Note: For additional details on creating contracts, please refer to the course entitled **PR344 Processing Purchase Orders**, located on the Cardinal website in **Course Materials** under **Training**.

2.   Create a PO using **Supplier ID 0000051418**

3.   Follow normal PO procedures, as referenced in the course entitled **PR344: Processing Purchase Orders,** to find and select the **Item 9105435001**.

4. The default **UOM** of **EA** is automatically populated.

5. Click the **Look up UOM** icon.

6. All **UOM**s for this item supplier relationship display and may be selected.

7. Click the **FTK Unit of Measure** link.

PO line information updates based on the selected UOM and is ready for completion.

8. Follow normal PO procedures, as referenced in the course entitled **PR344: Processing Purchase Orders**, to complete your PO.

Inactivate an Item

1. Once an NIGP number/**Item ID** is entered into Cardinal it cannot be modified or deleted. However, you can make changes, inactivate, and in some cases, reactivate the **Item ID**. To inactivate an **Item ID**, navigate to the **Item Definition** page using the following path:

   Main Menu > Items > Define Items and Attributes > Define Item

2. Click the **Find an Existing Value** tab.

3. Ensure that **STATE** is listed in the **SETID** field.

4. Enter the NIGP number/**Item ID** you want to find.

5. Click the **Search** button.

6. The **General** tab displays.

7. Click the **Custom** tab.

8. Remove the **WebIMS Item ID** value (stock number).

9. Click the **Save** button.

10. Click the **General** tab.

11. If the item should be removed from both inventory and non-inventory, click the **Purchasing Item Attributes** link.

12. Change the **Unavailable** field date value to today's date.

13. Click the **Apply** button.

14. Click the **OK** button.

15. The **General** tab displays.

16. Change the **Future Status Date** field to tomorrow's date.

17. Select **Inactive** from the **Future Status** drop-down menu.

18. Click the **Save** button. Your entries are saved and the item is unavailable effective immediately.